



11923 Centre Street Ste A3
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New Client Information Sheet

Name _____

Address _____

Business Legal Name _____

Address _____

Phone Number _____

Email Address _____

Tax ID # _____

- Business Type
- Sole Proprietor
- S Corporation
- C Corporation
- Limited Liability Company

What services are you interested in:

- Federal Tax Return Preparation
- State Tax Return Preparation
- Sales and Use Tax
- Payroll
- Software Purchase
- Accounting System Set-up (QuickBooks)
- Accounting/Bookkeeping
- Tax Problem Resolution
- Other _____

How did you hear about us?

How long have you been in business? _____

Do you have someone helping you with your accounting and taxes now?

Are there any issues or concerns that you may have that I need to be made aware of?

What was your most recent tax year filing? _____

Is it okay to mail you newsletters, holiday cards, reminders, etc by mail and or email?

Signature _____ Date _____

Signature _____ Date _____

